

# eWReports

*User Documentation Manual*

*Version 2.0*

*March 17, 2005*

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## 1. INTRODUCTION

Welcome to eWReports v.2. Exciting new functionality has been added, such as the ability to work with On Demand reporting directly from eWReports. In addition, the whole look and feel of the application has been changed to make it simpler to use.

This document is a guide to using the new version of eWReports. It is designed for anyone using eWReports v.2, regardless of whether it's your first experience with the application or you were a "power user" of the original.

## 2. eWReports Main Window

### 2.1 Current Reports

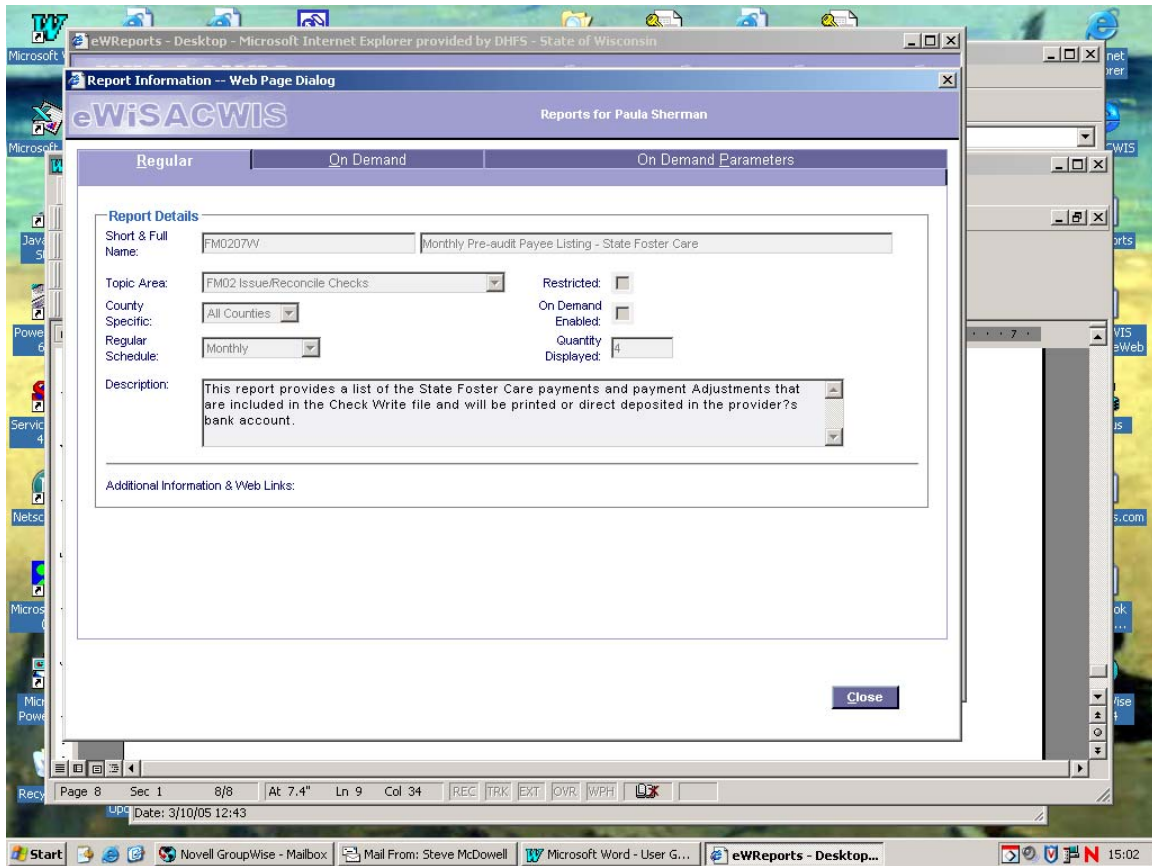
Current	Archive	On Demand
Report Name	Run Date	Report Output
<a href="#">CM0101 - 18 Year Old Report</a>	03/01/2005	<a href="#">cm0101-r-report-State.doc</a>
<a href="#">CM0601a - Contacts with Children and Parents</a>	02/09/2005	<a href="#">CM0601a-contacts-cntc-detail-State.xls</a>
<a href="#">CM0601b - Contacts with Children and Parents - OPEP</a>	02/09/2005	<a href="#">CM0601b-contacts-opep-detail-All-Counties.xls</a>
<a href="#">CM0601c - Contacts with Children and Parents - Statewide Summary</a>	02/09/2005	<a href="#">CM0601c-contacts-state-smny-case.doc</a>
<a href="#">CM2102 - AFCARS Foster Error Report</a>	02/08/2005	<a href="#">cm2102-r-afcars-fstr-errors-State.xls</a>
<a href="#">FM0101 - 19 Year Old Report</a>	03/01/2005	<a href="#">fm0101-r-report.doc</a>
<a href="#">FM0102 - Episode Driven Payments</a>	03/01/2005	<a href="#">fm0102-r-report-State.doc</a>
<a href="#">FM0104 - Wraparound/FPIYES Reconciliation</a>	03/03/2005	<a href="#">fm0104-r-wraparound-reconc-State.doc</a>
<a href="#">FM0201 - Pending Checks Payee Listing</a>	03/01/2005	<a href="#">FM0201-PENDING-CHECKS-PAYEE-LISTING-State.xls</a>
<a href="#">FM0202 - Monthly Pre-Audit Payee Listing</a>	03/03/2005	<a href="#">FM0202-MONTHLY-PRE-AUDIT-PAYEE-LISTING-State.xls</a>
<a href="#">FM0203 - Monthly Payment Listing</a>	02/10/2005	<a href="#">FM0203-report-State.doc</a>
<a href="#">FM0206W - Pending Checks Payee Listing - State Foster Care</a>	03/01/2005	<a href="#">FM0206W-PENDING-CHECKS-PAYEE-LISTING-STATE-FOSTER-CARE.xls</a>
<a href="#">FM0207W - Monthly Pre-audit Payee Listing - State Foster Care</a>	03/03/2005	<a href="#">FM0207W-MONTHLY-PRE-AUDIT-PAYEE-LISTING-STATE-FOSTER-CARE-State.xls</a>
<a href="#">FM0208W - Pending Checks Payee Listing - Adoption Assistance</a>	03/01/2005	<a href="#">FM0208W-PENDING-CHECKS-PAYEE-LISTING-ADOPTION-ASSISTANCE.xls</a>
<a href="#">FM0209W - Monthly Pre-audit Payee Listing - Adoption Assistance</a>	03/03/2005	<a href="#">FM0209W-MONTHLY-PRE-AUDIT-PAYEE-LISTING-AA-State.xls</a>
<a href="#">FM0211a - Kinship Care High Payment Report</a>	03/01/2005	<a href="#">fm0211a-r-kinship-high-payment-report-State.doc</a>
<a href="#">FM0220M - Monthly Payments for Ongoing Services</a>	03/03/2005	<a href="#">FM0220M-OUT-OF-HOME-COST-OF-CARE.doc</a>
<a href="#">FM0220P - Number of Children in Placement and Payments</a>	03/03/2005	<a href="#">FM0220P-CHILDREN-PAYMENTS-PER-MONTH.doc</a>
<a href="#">FM02B01 - New Overpayments</a>	03/01/2005	<a href="#">fm02b01-r-report-State.doc</a>
<a href="#">FM02B02 - Outstanding Overpayments</a>	03/01/2005	<a href="#">fm02b02-r-report-State.doc</a>
<a href="#">FM02B03 - Overpayments to Collections</a>	03/01/2005	<a href="#">fm02b03-r-report-State.doc</a>
<a href="#">FM02B04 - Overpayment Adjustment</a>	03/03/2005	<a href="#">fm02b04-r-report-vchr-22432-State.doc</a>
<a href="#">FM02VW - Voucher Worksheet</a>	03/03/2005	<a href="#">fm02vw-voucher-worksheet-State.xls</a>
<a href="#">FM04A01 - Case Counts</a>	02/10/2005	<a href="#">fm04a01-r-report-01012005-01312005-All-Counties.doc</a>
<a href="#">FM04A02 - Benefit Payments</a>	02/10/2005	<a href="#">fm04a02-r-report-20050101-20050131-All-Counties.doc</a>
<a href="#">FM04a10 - Payment Based Days of Care</a>	02/10/2005	<a href="#">fm04a10-r-report-2005-01-01-2005-01-31--All-Counties.doc</a>
<a href="#">FM0701b - Trust Account Current Balance Report</a>	02/22/2005	<a href="#">fm0701b-trst-acct-curr-bal-report-State.xls</a>

The **Current** tab will be where you will spend almost all of your time in eWReports. This tab displays the latest, or most up to date, standard version of every report file to which you are authorized. "Standard" means the report was produced as part of a standard nightly batch run.

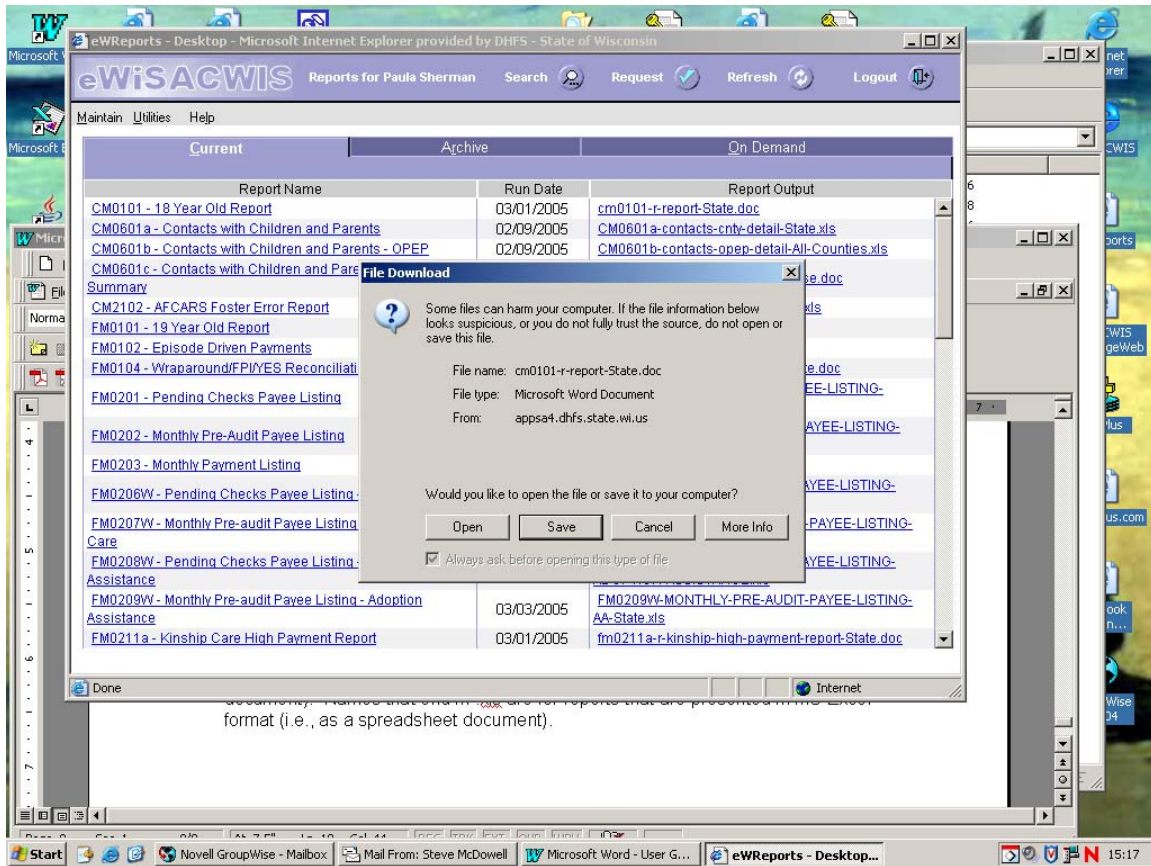
This window consists of three columns. The right-most column is labeled **Report Output**. The actual reports are accessed from this column. Viewing the list on this example page you can see that what is displayed are report file names. Names that end in .doc are for reports that are presented in MS Word format (i.e., as a word processing document). Names that end in .xls are for reports that are presented in MS Excel format (i.e., as a spreadsheet document). Names that end in .pdf are presented in Adobe Acrobat format.

The center column is labeled **Run Date** and displays the last date on which the report ran.

**Report Name** is the left-most column. Every report that you are authorized to see will be shown in this column in alphabetical order. These are the names that will be familiar to you.



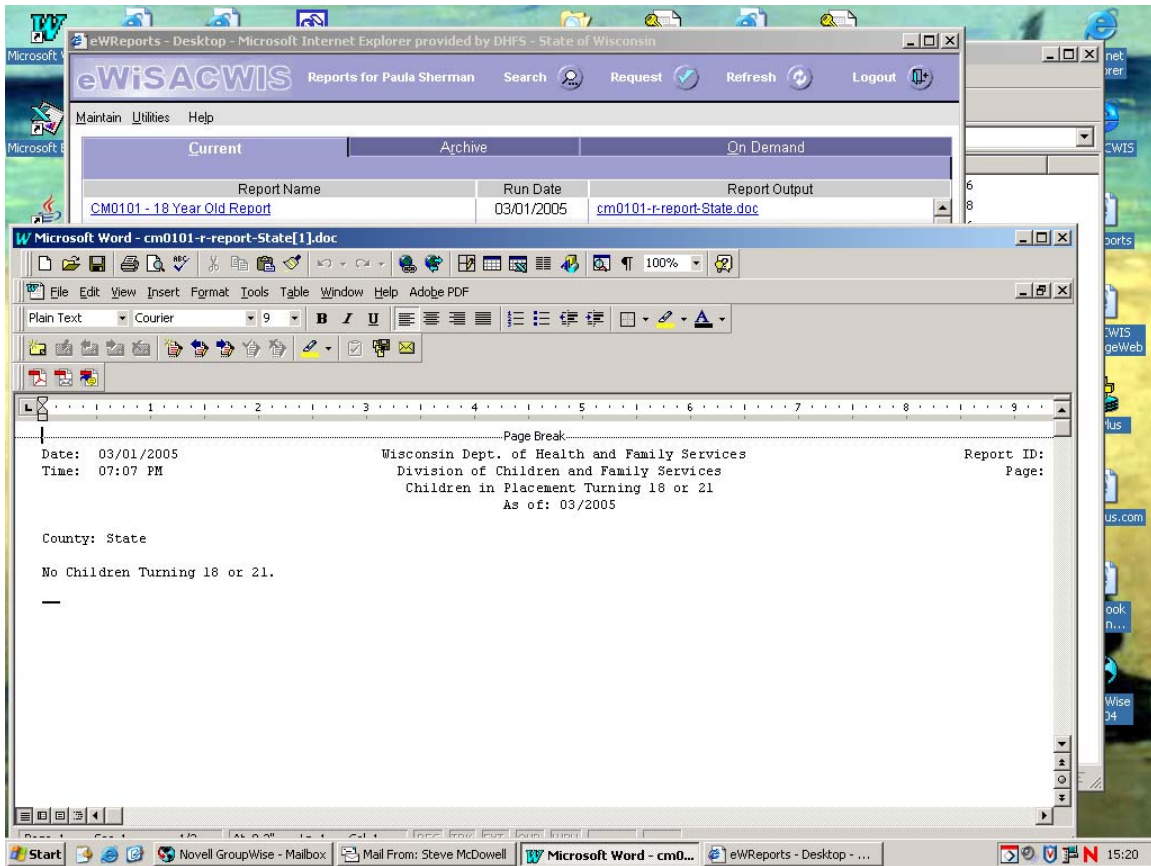
Clicking on a report name brings up **Report Information** window, which provides detailed information about the report. Press the **Close** button to return to the Current tab.



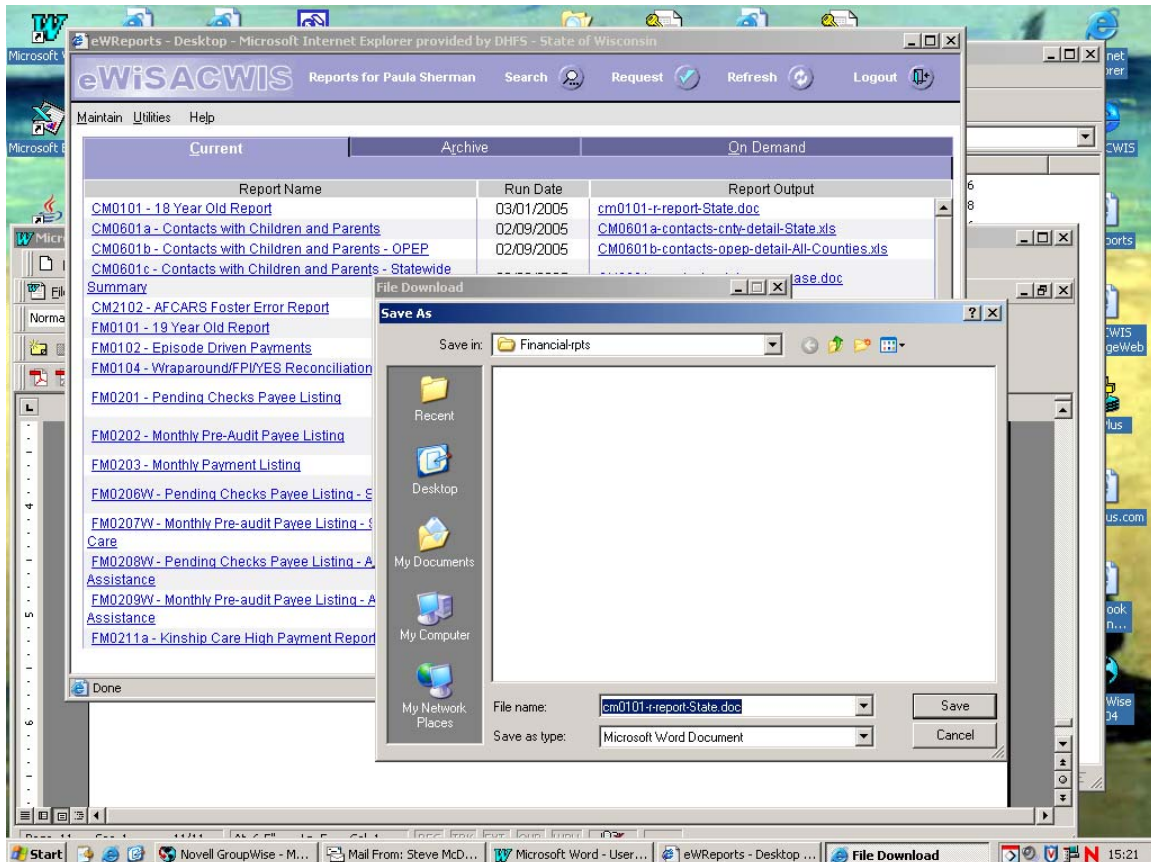
This popup window is displayed after clicking on a **Report Output** value. It is asking you to choose how you wish to use the report file.

The popup window is a standard Windows popup used for transferring files. Four options are presented that will be described in detail. The four options are:

- **Open**, used to view the document. This function will be described in detail below.
- **Save**, used to download and save a copy of the file on the local network or PC. This function will be described in detail below.
- **Cancel** closes the popup window..
- **More Info** opens MS Windows help



**Open** allows you to look at the report file on your desktop. The report will be presented in MS Word if the file ended in .doc, MS Excel if the file ended in .xls or Adobe Acrobat if the file ended in .pdf. Once opened, the report will display just like any other document, and you will be able to save it to a directory. This option can be selected if you want to look at the report before saving it.



- **Save** will cause the standard Windows Save As popup window to display. You will be able to save the file to any directory accessible from your PC. Only a small number of historical reports are saved on eWReports. The application is not designed to be a permanent reports archive, but rather as a delivery vehicle. If there will be any need to use the report in the future you are strongly urged to save the report to a directory on your PC. Another advantage to saving a report is that it will open faster. The reports that you see in eWReports are stored on State servers. This means that when you click to open a report, you are sending the command over the Internet to the eWReports program, which will then send the actual report over the Internet to be viewed on your desktop.



## 2.2 Archive Reports

Report Name	Run Date	Report Output
<a href="#">CM0101 - 18 Year Old Report</a>	03/01/2005	<a href="#">cm0101-r-report-State.doc</a>
	02/01/2005	<a href="#">cm0101-r-report-State.doc</a>
	01/03/2005	<a href="#">cm0101-r-report-State.doc</a>
	12/01/2004	<a href="#">cm0101-r-report-State.doc</a>
<a href="#">CM0601a - Contacts with Children and Parents</a>	02/09/2005	<a href="#">CM0601a-contacts-cnty-detail-State.xls</a>
	02/09/2005	<a href="#">CM0601a-contacts-cnty-smry-State.doc</a>
<a href="#">CM0601b - Contacts with Children and Parents - OPEP</a>	02/09/2005	<a href="#">CM0601b-contacts-opep-detail-All-Counties.xls</a>
	02/09/2005	<a href="#">CM0601b-contacts-opep-smry-case-All-Counties.xls</a>
	02/09/2005	<a href="#">CM0601b-contacts-opep-smry-child-All-Counties.xls</a>
<a href="#">CM0601c - Contacts with Children and Parents - Statewide Summary</a>	02/09/2005	<a href="#">CM0601c-contacts-state-smry-case.doc</a>
	02/09/2005	<a href="#">CM0601c-contacts-state-smry-child.doc</a>
<a href="#">CM2102 - AFCARS Foster Error Report</a>	02/08/2005	<a href="#">cm2102-r-afcars-fstr-errors-State.xls</a>
	02/08/2005	<a href="#">cm2102-r-afcars-fstr-errors-.xls</a>
	01/06/2005	<a href="#">cm2102-r-afcars-fstr-errors-.xls</a>
	01/06/2005	<a href="#">cm2102-r-afcars-fstr-errors-State.xls</a>
	12/06/2004	<a href="#">cm2102-r-afcars-fstr-errors-State.xls</a>
	11/04/2004	<a href="#">cm2102-r-afcars-fstr-errors-State.xls</a>
<a href="#">FM0101 - 19 Year Old Report</a>	03/01/2005	<a href="#">fm0101-r-report.doc</a>
	02/01/2005	<a href="#">fm0101-r-report.doc</a>
	01/03/2005	<a href="#">fm0101-r-report.doc</a>
	12/01/2004	<a href="#">fm0101-r-report.doc</a>
<a href="#">FM0102 - Episode Driven Payments</a>	03/01/2005	<a href="#">fm0102-r-report-State.doc</a>
	02/25/2005	<a href="#">fm0102-r-report-State.doc</a>
	02/18/2005	<a href="#">fm0102-r-report-State.doc</a>
	02/11/2005	<a href="#">fm0102-r-report-State.doc</a>
<a href="#">FM0104 - Wraparound/FPI/YES Reconciliation</a>	03/03/2005	<a href="#">fm0104-r-wraparound-reconc-State.doc</a>

The **Archive** tab looks very similar to the current tab, with only one difference. This window contains all the historical versions of a report that are accessible. The number of Report Output files available for each report is a set number that you cannot modify. For example, CM0101 – 18 Year Old Report is a monthly report. The Archive window will display the current version and the last 3 month's worth of reports. In this example, you can see that the latest and most current version was run on March 1, 2005. The February, January and December versions are also available. Notice that no other versions are displayed. eWReports is not a reports archive; it only contains the historical versions shown on the Archive tab. Therefore, you are encouraged to utilize the **Save** option to retain copies of the reports on your local directories.

## 2.3 On Demand Reports

The screenshot shows the eWISACWIS web application interface. The browser title is "eWReports - Desktop - Microsoft Internet Explorer provided by DHFS - State of Wisconsin". The page header includes the eWISACWIS logo, "Reports for Paula Sherman", and navigation links: Search, Request, Refresh, and Logout. Below the header, there is a "County:" dropdown menu set to "State". The main content area has three tabs: "Current", "Archive", and "On Demand". The "On Demand" tab is selected, displaying a table with the following data:

Report Name	Status	Run Date	Report Output
<a href="#">CM0101 - 18 Year Old Report</a>	Running	03/17/2005 13:19:50	Started on Thu Mar 17 13:19:27 CST 2005
<a href="#">CM0601a - Contacts with Children and Parents - County</a>	Submitted	03/17/2005 13:23:15	Waiting - no database connection available.
<a href="#">FM0701b - Trust Account Current Balance Report</a>	Completed	03/11/2005 15:53:04	<a href="#">fm0701b-r-trst-acct-curr-bal-report.xls</a>
	Completed	03/10/2005 16:08:31	<a href="#">fm0701b-r-trst-acct-curr-bal-report.xls</a>

The taskbar at the bottom shows the Start button, several open applications (Novell GroupWise, Mail, Microsoft Word, eWReports), and the system clock showing 13:25 on 03/17/05.

This tab displays all existing On Demand reports you have submitted.

This tab has similar functionality in the **Report Name**, **Run Date** and **Report Output** columns as that of the **Current** and **Archive** tabs. What differs is the **Status** column. Every report line displayed will show one of 4 values in this field:

- **Completed**, meaning that the report request has been successfully run.
- **Hold**, meaning that you have chosen to place the request on hold
- **Running**, meaning that the report is currently being run
- **Submitted**, meaning that the report request has been submitted but has not yet been run.

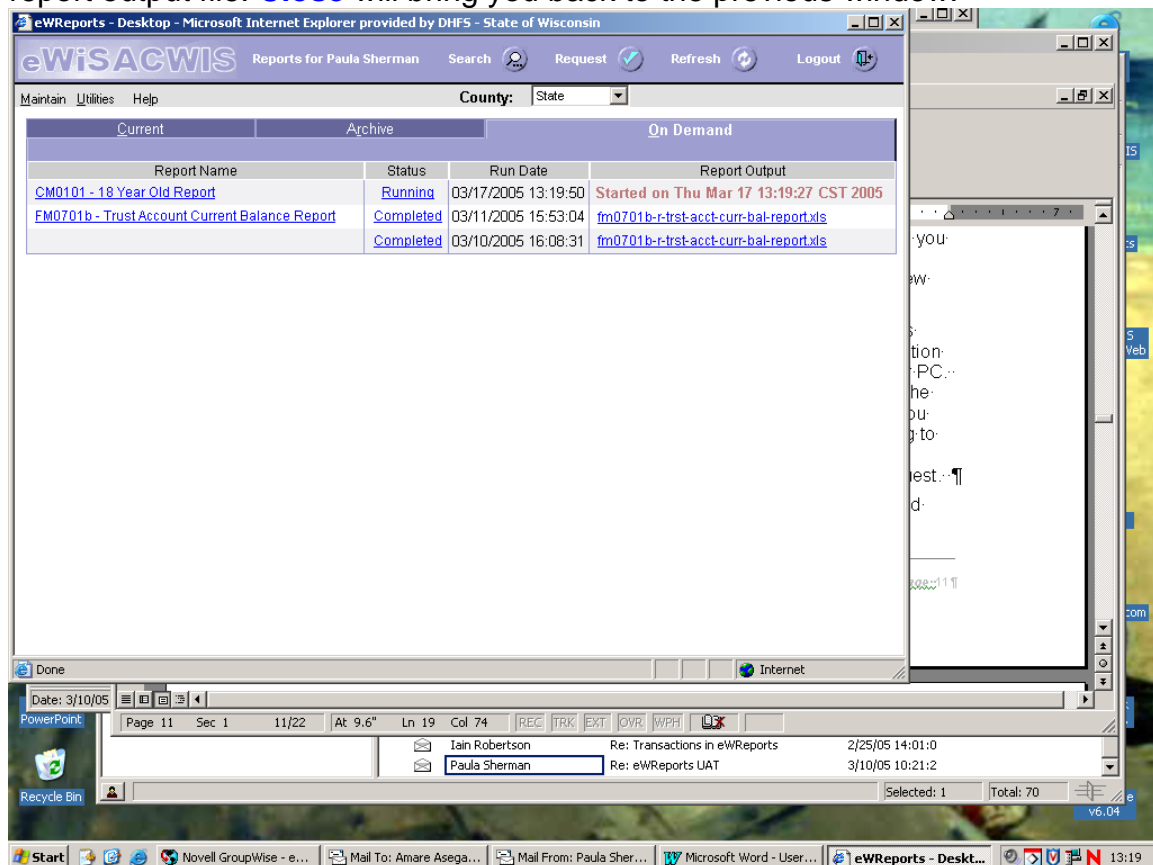
Selecting the value in the **Status** column will take you to the **On Demand Report Request Edit** window, which displays the values used when running the report. Depending on the status of the request, different functionality is available in the edit window.

When a report is in Completed status the [On Demand Report Request Edit](#) window displays the values that were used when running the report. A link to the report output file is at the bottom of the page.

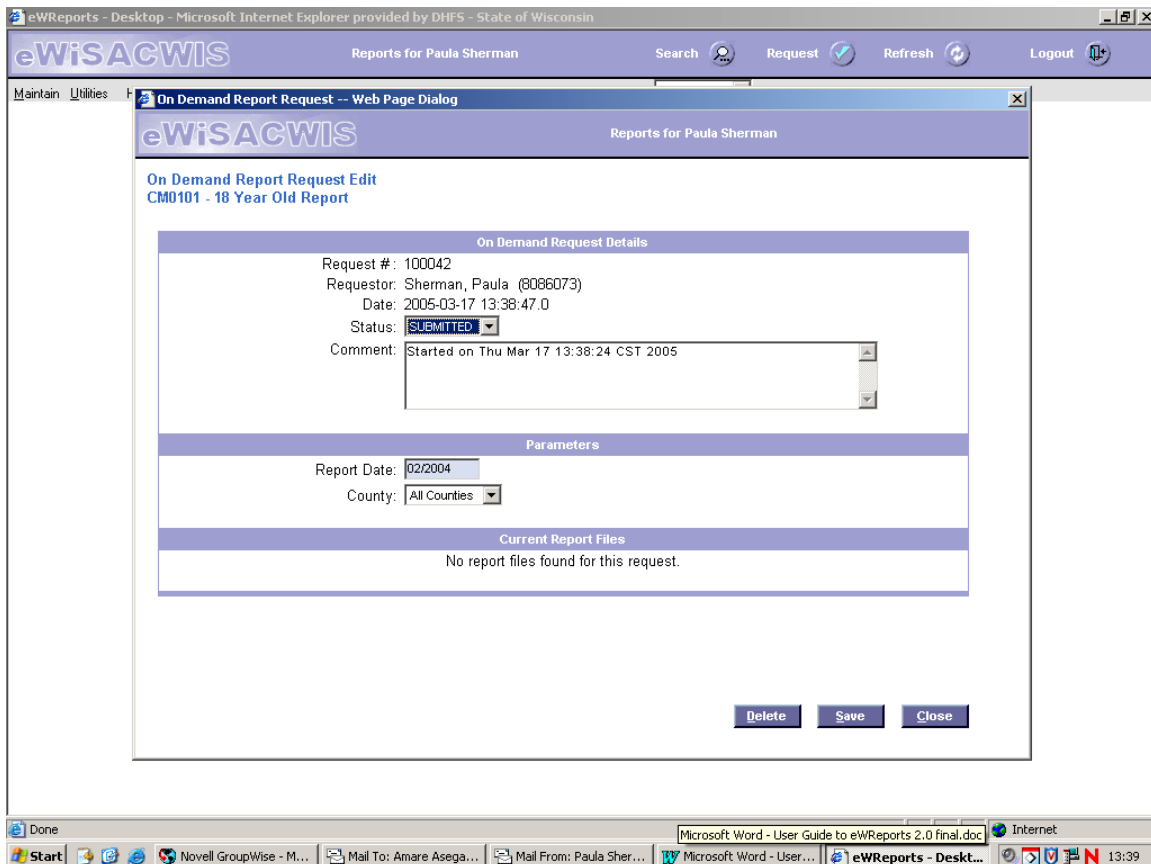
You can choose to submit another On Demand request for the same report. Once you place your cursor in any of the parameter fields and change a value, the [Save](#) option will become usable. Selecting the [Save](#) option will result in a new request to run the report.

It is important to realize that this will cause the existing report output file to be deleted. The new request replaces the original request. Before using this option you will want to save the report output file to a directory accessible from your PC. This functionality is intended to make it easier to enter multiple requests for the same report, but with different parameters. An example would be if you needed a monthly report run for each of the last 6 months. Instead of having to enter 6 separate On Demand requests, you would only need to go into this window and change the start and end dates for each subsequent report request.

Selecting the [Delete](#) option will delete both the report request information and the report output file. [Close](#) will bring you back to the previous window.



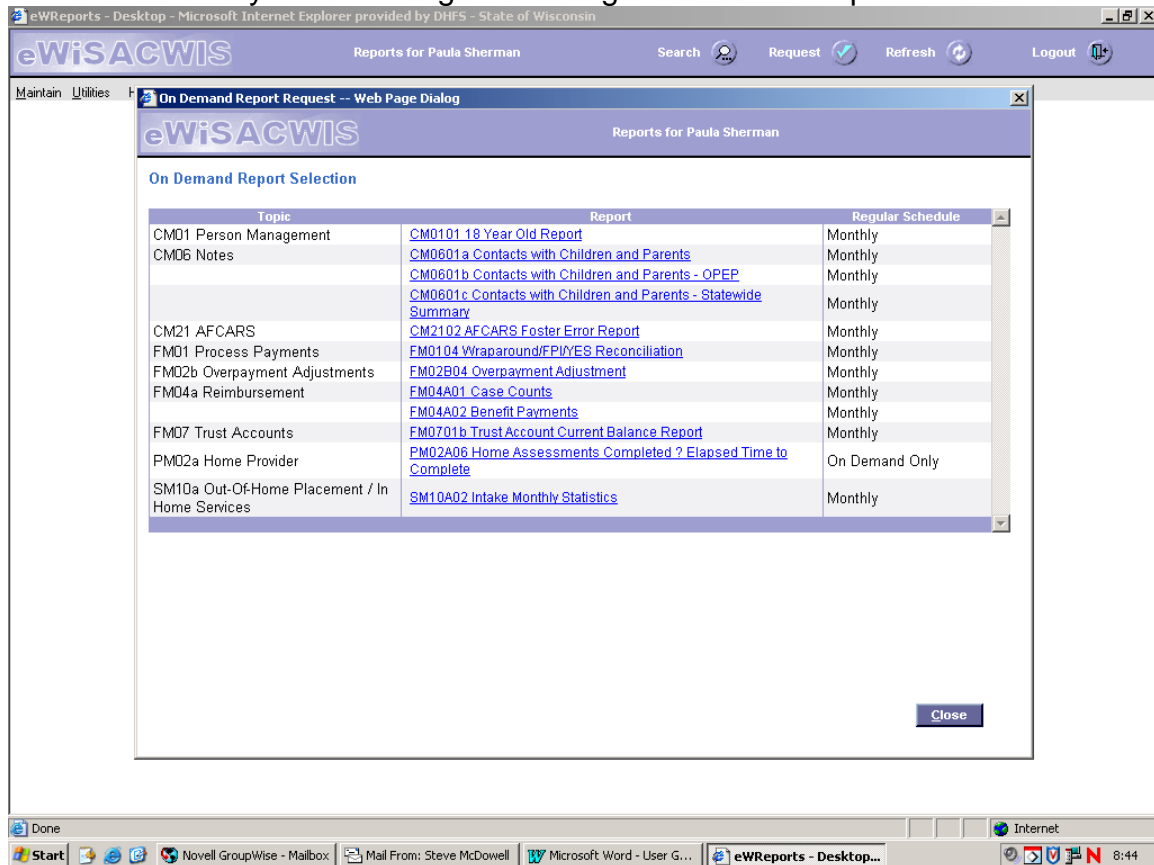
Occasionally you will see Running in the **Status** column. This means the report request is being run.



When the **Status** column contains a value of Submitted it means that you have successfully entered a request but it has not yet run. You have several options when viewing the **On Demand Report Request Edit** window for a report in Submitted status. If you merely wanted to review the values you choose, select **Close** to leave the window. **Delete** will cancel the request. You can also change any of the parameter values and use **Save** to replace the original request with the new request. Finally, you can change the Status value to Hold. This will keep the request but prevent it from running. You can come back later to edit, submit or delete the request.

### 3. On Demand Report Request

Prior to eWReports v2.0, On Demand reports were submitted through a screen on the eWiSACWIS application. On Demand reports are now submitted only through eWReports. More functionality has been added to this process. You will now be able to know exactly what parameters are needed for a report, and be sure that you are entering them correctly. It is now possible to check on the status of a submitted request, and even to change the request if it has not run. Finally, completed On Demand reports will be posted on eWReports with the same functionality for reviewing and saving as Standard Reports.



The **On Demand Report Request** window shown above will guide you through the process of submitting your report request. This window is accessed from either the **Request** button on the Top Bar or the **Utilities>Request On Demand Report** option on the Menu Bar. It displays all reports for which you have the authority to submit an On Demand request.

On Demand reports differ from Standard reports in two important ways.

First, an On Demand request causes a special run of a report with the parameters (or values) you supplied. For example, FM0701b Trust Account Current Balance is run at the end of each month as part of the Monthly Trust Account Current Balance run. An On Demand request for this report would be done if there was a need to review the report for a month and year that wasn't

available. In this case, you would make a special request to have the report run for you with the specific information you wanted to see. The result would be a job that would produce only a single output report file – the one you requested.

Second, the output file produced by an On Demand run is viewable only by the person who requested the report. If you are one of five people at your county authorized to view the Standard version of FM0701b Monthly Trust Account Current Balance, and you submit a request for an On Demand run of the report, you will be the only person who will see the completed report from that request.

After selecting a report you will be brought to the **On Demand Report Parameter Selection** window. The center of the window is where you will enter the parameters, or values, needed to produce the report.

In this instance, using the FM0701b Trust Account Current Balance Report, you are being asked to supply the County, Begin Date, End Date, Trust Account Type and Balance Type as parameters. The column on the right provides information to help you decide what values to enter, and the center column, labeled Value, is where you will enter the parameter values. The On Demand request will not be submitted until you have entered valid information in all required fields. The application will guide you on this.

Parameter	Value	Description
County	State ▾	The county that this report will run for.
Begin Date		Enter the first day of the month or the quarter.
End Date	Enter a date. mmddyyyy or mm/dd/yyyy	Enter the last day of the month or the quarter.
Trust Account Type	General ▾	
Balance Type	All ▾	

When your cursor is placed on the Begin Date field the application tells you exactly what information is needed and what its format should be.

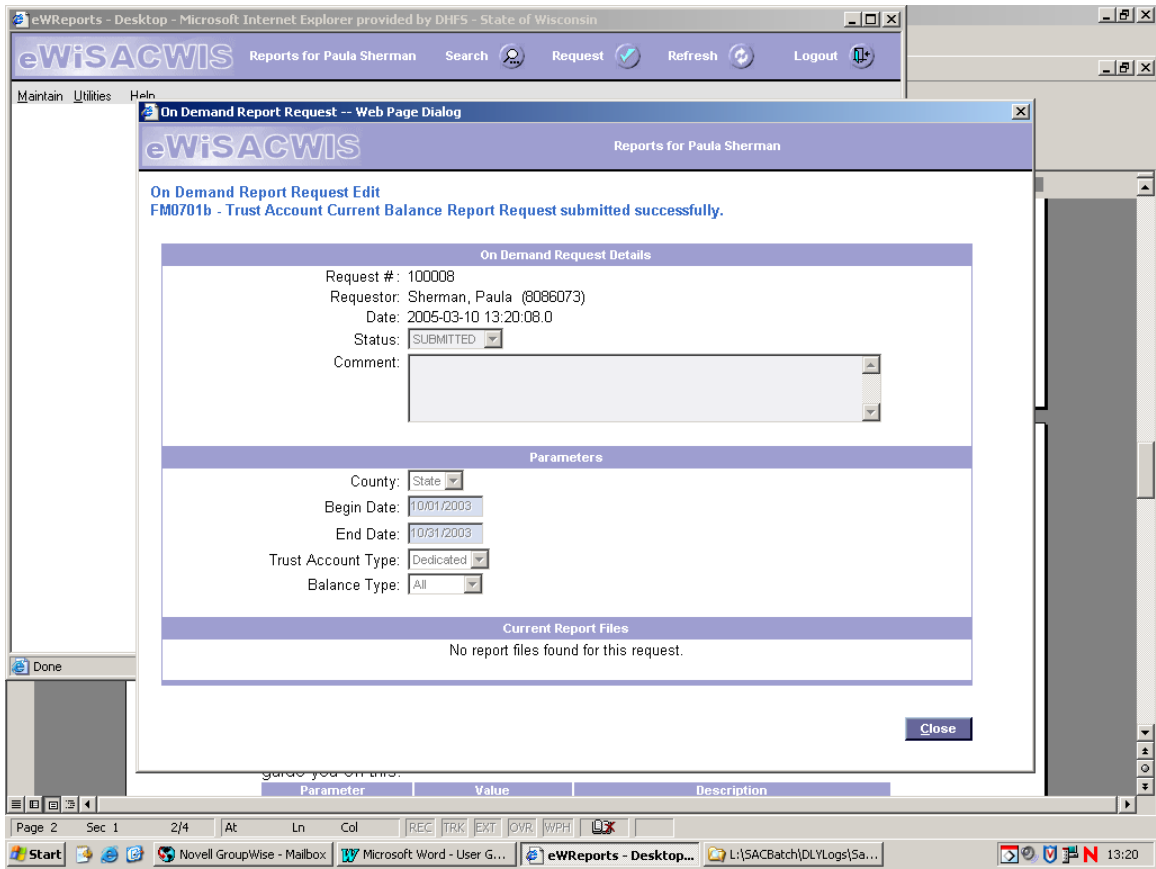
Parameter	Value	Description
County	State ▾	The county that this report will run for.
Begin Date	1/4/23/2005	Enter the first day of the month or the quarter.
End Date	Enter a valid date.	Enter the last day of the month or the quarter.
Trust Account Type	General ▾	
Balance Type	All ▾	

As you can see, it is not possible to enter incorrect information.

Parameter	Value	Description
County	State ▾	The county that this report will run for.
Begin Date		Enter the first day of the month or the quarter.
End Date		Enter the last day of the month or the quarter.
Trust Account Type	General ▾	
Balance Type	General Dedicated	

Some parameters, such as Balance Type, have pre-determined values that you will see in a drop down select window.

After entering all information pressing the **Submit** button ends the activity by automatically submitting a request to have the job run.



The window is updated to show that the request has been submitted. When the **Close** button is selected you will be taken to the **On Demand** tab display.



## 4. SYSTEM OVERVIEW

### 4.1 Application overview



Shown above is the main window for eWReports. It is what you will see when logging on to the application. All eWReports windows can be divided into three sections:

1. The tool bar that identifies the application and contains application-wide functionality.
2. The menu bar that allows the end user to launch specific actions.
3. The main window area that displays information.

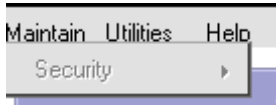
## 4.2 Tool bar



The tool bar contains the following information (reading from left to right):

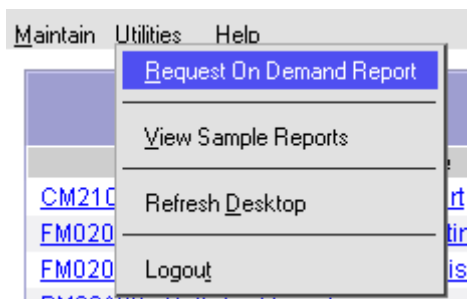
- Identification of the application as eWReports.
- Window name (Reports for *Your Name*).
- **Request** button, used for On Demand functionality.
- **Refresh** button, used to update the desktop to contain the most current information.
- **Logout** button, used to exit the application.

## 4.3 Menu Bar



The menu bar contains options that may or may not be usable based on your individual authority level for eWReports.

**Maintain** provides access to the security function. **Security** is for use by your County's report authorizer to manage the distribution of reports. This manual will not cover security functionality.

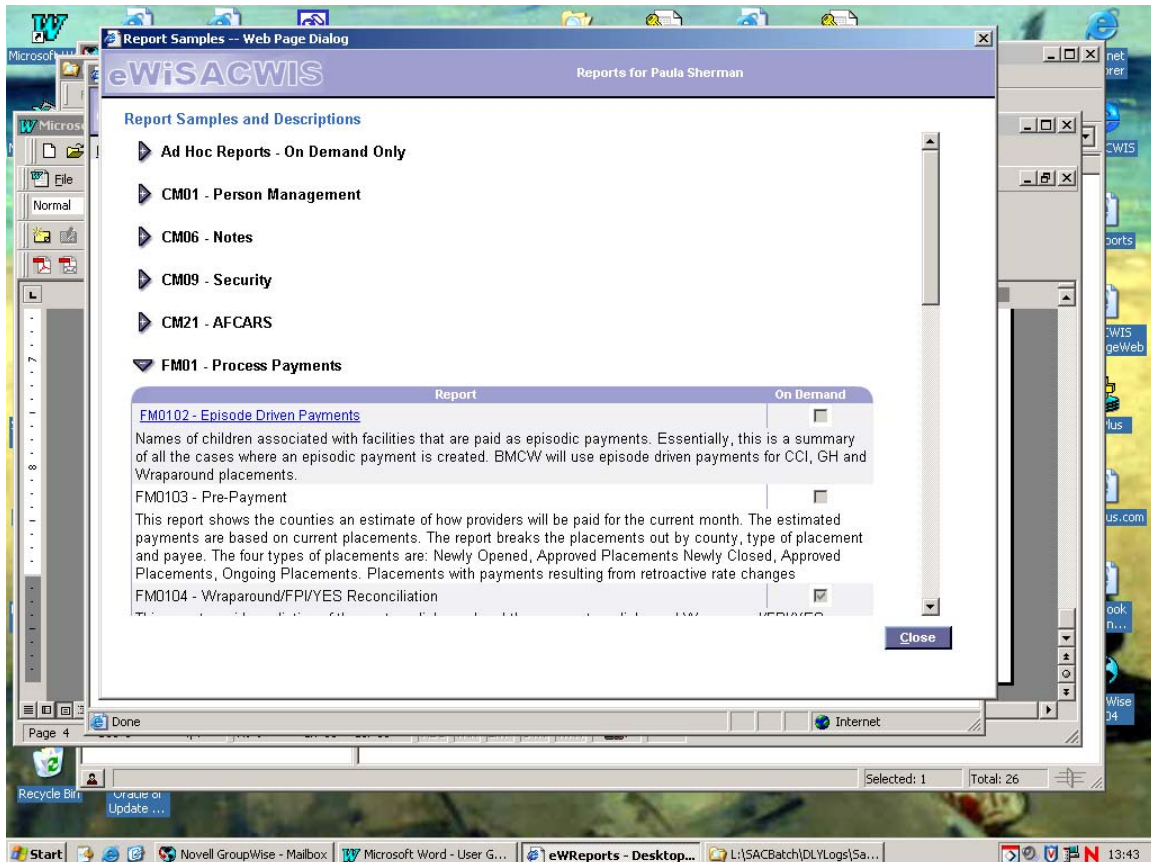


**Utilities** provides access to four functions.

1. **Request On Demand Report**
2. **View Sample Reports**
3. **Refresh Desktop**
4. **Logout**

**Refresh Desktop** and **Logout** provide the same functionality that is available when using the tool bar buttons.

**Request On Demand Report** is a new eWReports function that replaces the On Demand functionality in the eWiSACWIS application.



**View Sample Reports** provides limited documentation on reports. More complete documentation is available at the eWiSACWIS Knowledgeweb Internet site at [http://dhfs.wisconsin.gov/wisacwis/knowledge\\_web/cnty\\_financial\\_info/calendars/Batch\\_run\\_frontpage.htm](http://dhfs.wisconsin.gov/wisacwis/knowledge_web/cnty_financial_info/calendars/Batch_run_frontpage.htm).

Reports are divided into topics. Clicking on the “expando” for the desired topic will show every report that is under the topic with a description of the report. The **On Demand** checkbox at the far right lets you know if the report can be requested as an On Demand report. Report names that are shown as active links, such as FM0102 Episode Driven Payments, have a report template example that can be viewed when selecting the link. Use the **Close** button to exit this window and return to the main window.

eWReports - Desktop - Microsoft Internet Explorer provided by DHFS - State of Wisconsin

**eWiSACWIS** Reports for Paula Sherman Search Request Refresh Logout

Maintain Utilities Help

Current Archive On Demand

Report Name	Run Date	Report Output
<a href="#">CM0101 - 18 Year Old Report</a>	03/01/2005	<a href="#">cm0101-r-report-State.doc</a>
<a href="#">CM0601a - Contacts with Children and Parents</a>	02/09/2005	<a href="#">CM0601a-contacts-ctny-detail-State.xls</a>
<a href="#">CM0601b - Contacts with Children and P</a>		<a href="#">CM0601b-contacts-ctny-detail-State.xls</a>
<a href="#">CM0601c - Contacts with Children and P</a>		<a href="#">CM0601c-contacts-ctny-detail-State.xls</a>
<a href="#">Summary</a>		
<a href="#">CM2102 - AFCARS Foster Error Report</a>		
<a href="#">FM0101 - 19 Year Old Report</a>		
<a href="#">FM0102 - Episode Driven Payments</a>		
<a href="#">FM0104 - Wraparound/FPI/YES Reconcil</a>		
<a href="#">FM0201 - Pending Checks Payee Listing</a>		<a href="#">FM0201-Pending-Checks-Payee-Listing-State.xls</a>
<a href="#">FM0202 - Monthly Pre-Audit Payee Listing</a>		<a href="#">FM0202-Monthly-Pre-Audit-Payee-Listing-State.xls</a>
<a href="#">FM0203 - Monthly Payment Listing</a>		
<a href="#">FM0206W - Pending Checks Payee Listi</a>		<a href="#">FM0206W-Pending-Checks-Payee-Listing-State-Foster-Care.xls</a>
<a href="#">FM0207W - Monthly Pre-audit Payee Listi</a>		<a href="#">FM0207W-Monthly-Pre-audit-Payee-Listing-State-Foster-Care-State.xls</a>
<a href="#">FM0208W - Pending Checks Payee Listi</a>		<a href="#">FM0208W-Pending-Checks-Payee-Listing-Adoption-Assistance.xls</a>
<a href="#">FM0209W - Monthly Pre-audit Payee Listi</a>		<a href="#">FM0209W-Monthly-Pre-audit-Payee-Listing-AA-State.xls</a>
<a href="#">FM0211a - Kinship Care High Payment F</a>		<a href="#">FM0211a-Kinship-Care-High-Payment-Foster-Care-State.doc</a>
<a href="#">FM0220M - Monthly Payments for Ongo</a>		<a href="#">FM0220M-Monthly-Payments-for-Ongoing-Care-State.doc</a>
<a href="#">FM0220P - Number of Children in Placer</a>		<a href="#">FM0220P-Number-of-Children-in-Placement-Month.doc</a>
<a href="#">FM02B01 - New Overpayments</a>		
<a href="#">FM02B02 - Outstanding Overpayments</a>		
<a href="#">FM02B03 - Overpayments to Collections</a>		
<a href="#">FM02B04 - Overpayment Adjustment</a>		
<a href="#">FM02VW - Voucher Worksheet</a>		
<a href="#">FM04A01 - Case Counts</a>	02/10/2005	<a href="#">fm04a01-r-report-01012005-01312005-All-Counties.doc</a>
<a href="#">FM04A02 - Benefit Payments</a>	02/10/2005	<a href="#">fm04a02-r-report-20050101-20050131-All-Counties.doc</a>
<a href="#">FM04A10 - Payment Based Days of Care</a>	02/10/2005	<a href="#">fm04a10-r-report-2005-01-01-2005-01-31--All-Counties.doc</a>
<a href="#">FM0701b - Trust Account Current Balance Report</a>	02/22/2005	<a href="#">fm0701b-trst-acct-curr-bal-report-State.xls</a>

**eWReports Version 2.0 Build: 0304 -- Web Page Dialog**

**eWiSACWIS** eWReports Version 2.0 Build: 0304

**User Information**

Name: Paula Sherman  
 eWiSACWIS worker: true  
 User ID: 8086073  
 wiUID: 2003050901010040  
 County: 76  
 Report Authorizer: false  
 All County Access: false  
 Security Level: false

Close

**Help** offers a single option, **About**. Choosing this option opens a popup window that provides information on how you are set up to use eWReports.

## 5. Conclusion

The eWReports Support Team continues to work on ways to make the application easier to use and more functional. Many of the changes added to eWReports v2.0 are the result of suggestions from application users throughout the State. Please continue to send enhancement requests and suggestions to [helpdesk@wi.gov](mailto:helpdesk@wi.gov) , being sure to enter “eWReports Enhancement” in the subject line of the email.